



This manual is for website Administrators, Users and Visitors. The CARMEN website can be found at: <http://www.carmen.org.uk/>.

The website is powered by the Plone Content Management System (CMS). Further information on Plone can be found at: <http://www.plone.org/>.

The screenshot shows the CARMEN website's homepage. At the top, there's a navigation bar with links for Home, News, Events, Blogs, About, Project Areas, People, Publications, Links, Contact Us, todo, admin, Help, and todo - critical. Below the navigation is a search bar. The main content area features a large group photo of the CARMEN team. To the left, there's a "WELCOME TO CARMEN" section and a "Latest News" section. The "Latest News" section includes a link to a presentation mode. To the right, there's a calendar for May 2008 with the 27th highlighted. At the bottom, there's a footer with copyright information and a note about local intranet support.

### This manual will explain:

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## 1 The process of identifying your username and password

1.1 Users of the CARMEN project management system, ActiveCollab ([http://carmen.ncl.ac.uk/project\\_management/](http://carmen.ncl.ac.uk/project_management/)), have User accounts for the CARMEN website. Your CARMEN website username will be *FirstnameLastnameActiveCollabUserKey*, e.g. AlastairKnowles18.

1.2 For simplicity, your username is also displayed on your user profile page, which can be found by visiting the people listing on the website:  
<http://www.carmen.org.uk/people/> (people listing)  
<http://www.carmen.org.uk/people/AlastairKnowles18> (User profile example)

1.3 Your password will be the same as it is for the CARMEN project management system.

1.4 Be aware that the website login is case sensitive. You must use capital letters where appropriate in your username and password.

12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

**Log in**  
 Login Name  
  
 Password  
  
**Log in**  
[Forgot your password?](#)

1.5 ActiveCollab synchronises with the website automatically. To alter your User profile information as it appears on the website, login to the project management system.

1.6 Website Administrators will have two User accounts. An account linked to ActiveCollab for management of their website profile, and a separate website administration account for access to website management functions.

1.7 Once you have logged into the website you can begin using the tools it provides.



## 2 Editing site content

2.1 Administrators can edit site content pages. The process is explained in this section.

2.2 Users can add items to listings such as news/blogs, events, publications and links.

These processes are explained in subsequent sections.

2.3 We demonstrate how to edit the text that appears in the about section:

<http://www.carmen.org.uk/about/>.

2.4 The process is the same for all other static content pages, e.g. pages that contain flat HTML-type text, as opposed to listings that are generated from a database.

2.5 If you are logged in as an Administrator, you will be presented with a toolbar directly above the content containing an edit button.

The screenshot shows a navigation bar with links: Home, News, Events, Blogs, About, Project Areas, People, Publications, Links, Contact Us, todo, admin, Help, todo - critical. Below the navigation bar, a breadcrumb trail says 'You are here: Home → About'. Underneath the trail is a toolbar with buttons: Contents, View, Edit, Rules, Sharing, History. A black arrow points from the text 'above the content containing an edit button.' to the 'Edit' button in the toolbar. The main content area has a heading 'Edit Page'.

2.6 Click the edit button. A standard form appears allowing you to edit the content.

The screenshot shows an 'Edit Page' form. At the top, there's a toolbar with buttons: Contents, View, Edit, Rules, Sharing, History. Below the toolbar, a message says 'Edit Page' and 'Info: You are editing the default view of a container. If you wanted to edit the container itself, go here.' A note below says 'A page in the site. Can contain rich text.' There are fields for 'Title' (containing 'About') and 'Description' (containing 'A short summary of the content.'). The main area is titled 'Body Text' and contains a WYSIWYG editor with a toolbar at the top. A large purple oval highlights the body text area. Below the editor, there's some descriptive text about the CARMEN project.

2.7 The editing form provides a WYSIWYG (What You See Is What You Get) editor, providing point click document editing functions similar to a word processor.

2.8 Once you have finished editing content, click save, or cancel if you wish to discard your changes.





### 3 Publishing Content

3.1 When you create content or listing items (e.g. pages, news/blogs, events and links) their state may be set to “Private” by default. This has to be changed to publish items or to submit them for approval by an Administrator. Publications are an exception to this rule and can be created and published freely by Users.

3.2 Items are not visible to public website Visitors until they have been “Published”. The process of publishing items is the same for all content types.

3.3 When you have finished creating an item you will be presented with a confirmation page which includes a toolbar with the “State” menu on it.

**todo - critical**

The screenshot shows a web-based administrative interface. At the top, there's a toolbar with buttons for 'Sub-types ▾', 'Actions ▾', 'Display ▾', 'Add new... ▾', and a 'State' dropdown set to 'Published'. Below the toolbar, there's a message: 'You do not have permission to add a blog.' To the right of the toolbar is a calendar for May 2008. The calendar grid shows dates from 1 to 31. The date '27' is highlighted in blue, indicating it's the current day. A tooltip box with the text 'Change the state of this item' is overlaid on the 'State' dropdown button. At the bottom right of the calendar, there's a link 'Manage portlets'.

3.4 If you create an item as a User you will have the option to “Submit for publication”. This alerts an Administrator that the item has been created and is pending approval. Your item will be approved and published or sent back to you for modification. Publications are an exception and can be created and published freely by Users.

3.5 As an Administrator you can skip the previous stage (3.4) and alter the status of your newly created item immediately to “Published” in the “State” menu.

3.6 The website also supports more granular publication settings which can be applied to all content items with the exception of publications.

**3.7** Of these settings, the “Publication” and “Expiration” dates may be useful, as they allow time-windows to be specified during which items appear on the site.

**3.8** To make use of these settings, click the “Dates” tab appearing on the confirmation page (refer to instructions 3.1, 3.2 and 3.3).

The screenshot shows a web-based interface for managing website collections. At the top, there is a navigation bar with links: Contents, View, Edit, Criteria, Subfolders, Rules, and Sharing. Below this, a title bar says "Edit Collection". Underneath, there is an "Info" box stating: "You are editing the default view of a container. If you wanted to edit the container itself, [go here](#)". A note below it says: "An automatically updated stored search that can be used to display items matching criteria you specify." A horizontal menu bar includes Default (selected), Categorization, Dates (selected), Ownership, and Settings. The main content area has two sections: "Publishing Date" and "Expiration Date". The "Publishing Date" section contains a note: "If the date is in the future, the content will not show up in listings and searches until this date." followed by a date input field set to "2008 / - / -". The "Expiration Date" section contains a note: "When this date is reached, the content will no longer be visible in listings and searches." followed by a date input field also set to "2008 / - / -". At the bottom left are "Save" and "Cancel" buttons.

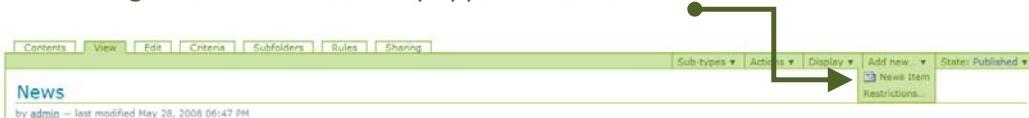


## 4 Creating news/blog items

**4.1** News and blog type items may be added to the news listing:

<http://www.carmen.org.uk/news/>

**4.2** As a User or Administrator, select “Add News Item” in the toolbar directly above the news listing. “Add News Item” may appear under the “Add New” menu.



**4.3** A standard form appears allowing you to enter the item. Complete this form as described in section 2. You should enter a summary of your item in the description field as this is displayed on summary listings and in RSS feeds.

**4.4** Follow the publication process described in section 3.

**4.5** An RSS feed can be generated by following the link at the bottom of the news listing. For more information on RSS feeds read the following: <http://www.whatisrss.com/>.



## 5 Viewing or creating events in the calendar

5.1 Event items may be added to the events listing: <http://www.carmen.org.uk/events/>.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

5.2 As a User or Administrator, select “Add Event” in the toolbar directly above the events listing. “Add Event” may appear under the “Add New” menu.

5.3 A standard form appears allowing you to enter the event item. Complete this form as described in section 2.

[Add Event](#)

Information about an upcoming event, which can be displayed in the calendar.

		Default	Categorization	Dates	Ownership	Settings
Title	<input type="text" value="test"/>					
Description	<p>A short summary of the content.</p> <div style="border: 1px solid #ccc; height: 100px; margin-top: 5px;"></div>					
Event Location	<input type="text"/>					
Event Starts	2008 / May / 29 09 : 30					
Event Ends	2008 / May / 29 09 : 30					
Event body text	<div style="border: 1px solid #ccc; height: 40px; margin-top: 5px;"> </div>					
Attendees	<div style="border: 1px solid #ccc; height: 100px; margin-top: 5px;"></div>					
Event Type(s)	<div style="border: 1px solid #ccc; width: 150px; height: 150px; margin-bottom: 5px;"></div>			<div style="border: 1px solid #ccc; width: 150px; height: 150px;"></div>		
Event URL	<p>Web address with more info about the event. Add http:// for external links.</p> <input type="text"/>					
Contact Name	<input type="text"/>					
Contact E-mail	<input type="text"/>					
Contact Phone	<input type="text"/>					
Change note	<p>Enter a comment that describes the changes you made.</p> <input type="text"/>					
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						

5.4 Follow the publication process described in section 3.



## 6 Adding/Viewing publications

**6.1** Publication items may be added to the publications listing:

<http://www.carmen.org.uk/publications/>.

**6.2** As a User or Administrator, select “Add Publication” in the toolbar directly above the publications listing. “Add Publication” may appear under the “Add New” menu.

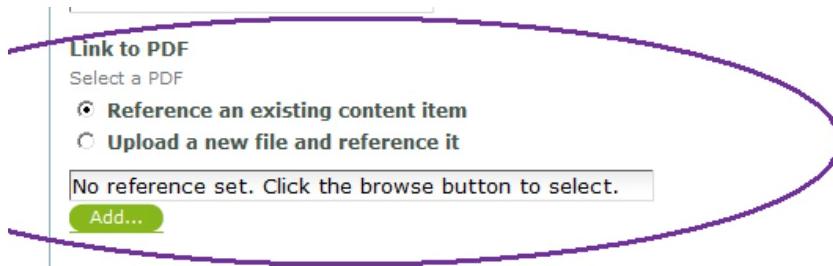


**6.3** A standard form appears allowing you to enter the publication. Complete this form as described in section 2.

**Add Publication**  
Publication that was published as a book.

Title *	<input type="text"/> Default <input checked="" type="radio"/> Metadata
Publication Title	<input type="text"/>
Author(s), one per line *	<input type="text"/>
Book, journal or conference title	<input type="text"/>
Chapter or volume number if any	<input type="text"/>
Page count	<input type="text"/>
Page start point	<input type="text"/>
Page end point	<input type="text"/>
Details - e.g. conference location	<input type="text"/>
ISBN	<input type="text"/>
Publisher	<input type="text"/>
Day	<input type="text"/> 1
Month (1..12) *	<input type="text"/> 1
Year *	<input type="text"/> 2008
Type of publication	<input type="text"/> Book
External URL	<input type="text"/> External URL of paper
Link to PDF	<input type="checkbox"/> Select a PDF <input checked="" type="radio"/> Reference an existing content item <input type="radio"/> Upload a new file and reference it
No reference set. Click the browse button to select. <input type="button" value="Add..."/>	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

6.4 You can link a publication hosted on an existing webpage by selecting the “Reference an existing content item” option. To upload a completely new publication, select the second option. This works in the same way as attaching a document to an email ...



6.5 ... Click browse to upload a file from your computer.

**Upload a new file and reference it**

6.6 Once you have linked and saved your publication, follow the publication process described in section 3.



## 7 Creating Links

7.1 Users and Administrators can create link items on the links page:

<http://www.carmen.org.uk/links/>. Link items are hyperlinks to other website pages that project members may find useful.

7.2 As a User or Administrator, select “Add Link” in the toolbar directly above the events listing. “Add Link” may appear under the “Add New” menu.



7.3 You will be asked to name, describe and enter the URL of the link.

<b>Title *</b>	<input type="text" value="Userguide test link"/>
<b>Description</b>	<input type="text" value="This is a test link for the userguide."/>
<b>URL *</b>	<input type="text" value="http://http://carmen.ncl.ac.uk:90"/>

7.4 When you have done this select save.

7.5 Follow the publication process described in section 3.



## 8 Reviewing Content

8.1 Administrators must review some items created by Users before publication.

8.2 A review list is displayed to Administrators to the bottom right of the page template.

5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

**Review List**  
 Testing Publication Workflow  
 AlastairKnowles18 — May  
 30, 2008  
[Full review list...](#)

8.3 Items can be reviewed individually by following the related links. The options to “Publish”, “Send Back”, or “Retract” are presented in the “State” menu.

View	Edit	Sharing	History	Sub-types	Actions ▾	State: Pending review ▾
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**Testing Publication Workflow**  
 by Alastair Knowles — last modified May 30, 2008 12:58 AM  
**Testing publication workflow**  
 Testing publication workflow

Publish  
 Send back  
 Retract  
[Advanced...](#)

8.4 By following the “full review list” link instead (refer to 8.1), multiple items can be reviewed in the same step.

**For queries or suggestions relating to this manual please contact**  
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